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REGIONAL GRAIN

COOPERATIVES

PROCUREMENT SECTION
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1976 and 1977



Picture on cover:

Mid-States Terminals, Inc., Toledo, Ohio presently has 5.8 million bushels of storage and plans to expand to 8.8 million bushels as shown.

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April 1979

Highlights

—Grain volume for the 14 primary regional grain cooperatives and 4 interregionals totaled a net of 1.9 billion bushels in fiscal 1976 and 1.8 billion in 1977 compared 1.6 billion in 1974. Corn was with the leading grain handled by the 18 regionals—totaling 695 million bushels followed closely by wheat with 571 million bushels. Together, corn and wheat comprised 68 percent of regionals' volume.

—The 14 primary regional grain cooperatives had 2,334 member local cooperatives with elevators in 3,700 towns. These local cooperatives had 1.8 billion bushels of storage capacity, a significant source of potential support for the regionals. The regional share of members' out-of-area sales varied from 25 to 80 percent.

—The 340 local line elevators operated by 6 regionals made up 8 percent of total cooperative country elevators affiliated with or owned by regionals. In addition, regionals operated 94 centrally controlled subterminal and terminal elevators, 35 of which are located on water—24 on navigable rivers, 4 on the Great Lakes, 4 on the Gulf coast, 1 on the Pacific coast, and 1 on the Atlantic coast. The rest are inland.

—Regionals had storage capacity for 465 million bushels of grain at terminal, subterminal, and processing locations—67 million bushels at ports, 56 million on navigable rivers, and 343 million inland.

—During fiscal 1977, regionals leased 2,516 rail hopper cars and owned 115, a total of 2,631. In 1975, regionals owned or leased 3,791 cars.

—Barge shipments of grain down the Mississippi and Columbia Rivers accounted for a large portion of regionals' grain shipments. Five regional grain cooperatives and CF Industries jointly purchased a barge company in July 1974. They now operate 9 tow boats and about 320 barges on the Mississippi River system.

—Significant improvements in facilities included new and acquired storage capacity, dust and pollution control systems, and increased in and out handling capacity. Two regionals expanded their soybean plant facilities and one regional purchased a soybean plant. One additional export elevator was acquired.

—Far-Mar-Co merged with Farmland Industries and became a subsidiary corporation. Far-Mar-Co opened a merchandising office in Los Angeles and GTA opened a merchandising office in Portland, Oregon. GTA purchased Holsum Foods, a food processing firm.

—New marketing agreements with producer members were initiated by three regionals.

—The 18 regionals disposed of their grain in fiscal 1977 by processing 8 percent in their own plants, selling 35 percent to domestic outlets, and shipping 57 percent to ports for export. This proportion has changed very little since 1974.

—Export volume in fiscal 1976 and 1977 was slightly over 1.0 billion bushels. Since 1974, regionals have increased their disposition to export elevators by more than 20 percent and have maintained their share of originations for export at about 28 to 30 percent of U.S. exports.

—Regionals shipped 59 percent of their export movement to their own export elevators—a total of 615 million bushels in 1977. A total of 428 million bushels were shipped to nonco-op export elevators, almost equivalent to the volume of three or four export elevators.

REGIONAL GRAIN COOPERATIVES 1976 and 1977

Stanley K. Thurston
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This report reflects 1976 and 1977 fiscal year operations of 14 primary regional and 4 interregional grain cooperatives (fig. 1). Other regionals handling grain are not included because their volume is relatively low. The 18 included represent about 97 percent of the total grain volume of all regional cooperatives. Rice and dried edible beans are excluded. Fiscal year ending dates for these regionals ranged from April to December.

General Description Of Regionals

A *primary regional* grain cooperative is defined generally as a cooperative that purchases or handles grain from local line or affiliated elevators or producers within a relatively large land area ranging from several counties to several States. All regionals included in this report have terminal storage facilities that physically receive grain. Some smaller regionals not included in this report do not have terminal facilities but do purchase and expedite direct grain shipments from local elevators to sales destinations. An *interregional* is a cooperative that is owned and controlled by two or more primary regionals.

Organization

These grain regionals are characterized by diverse types of organization. Thirteen are solely grain marketing cooperatives, and five are grain divisions of larger cooperative organizations. Grain regionals may be federated or centralized cooperatives, or a combination of the two. Control of all regionals lies ultimately with producers.

The grain regionals are largely federated with local member cooperatives and independent boards of directors and management. The regional's board is generally elected by representatives or delegates from areas served by the regionals. Directors are mainly producer members, but in some instances are local managers.

Centralized regionals own and operate local elevators. The local elevators do not have independent boards of directors; however, they may have local advisory boards. The centralized regional's board is elected in the same general manner as that of a federated regional.

Figure 1 -- Location of headquarters of regional grain cooperatives, 1977



Member Local Cooperatives

The 14 regionals had 2,348 member local associations or cooperatives with one elevator or more at end of fiscal 1977 (table 1). Altogether, they had local elevators in 3,714 towns or rural locations. Affiliated member associations have increased by 86 since fiscal 1973.

The estimated storage capacity of these 2,348 local associations is 1.8 billion bushels, a significant support factor for the regional marketing system. Local associations for four regionals—Far-Mar-Co, Union Equity, Illinois Grain Corp. and Farmers Grain Dealers Association—provide 75 percent of such total storage capacity.

Many of the local cooperatives sell a significant volume of grain outside cooperative channels rather than to their regional. It is estimated that regionals' share of members' out-of-area sales ranges from an average of 25 to 80 percent.

Line or Centrally Controlled Local Elevators

Six regionals operated 340 local line elevators (table 2). This type of elevator made up 8 percent of the country elevators affiliated with or owned by regional grain cooperatives. The total number of cooperative line elevators has remained relatively constant since fiscal 1973.

In addition to the 340 line country elevators, the 14 primary regionals operated 95 centrally controlled subterminals and terminals. These were established primarily to serve

Table 1—Number of member local associations with elevators, number of elevator locations, and estimated storage capacity, for cooperative associations affiliated with regional grain cooperatives, end of fiscal 1977¹

Regional cooperative	Member associations with elevators	Elevator locations	Estimated storage capacity
	--- Number ---		1,000 bu.
Illinois Grain Corporation	215	400	240,000
Far-Mar-Co	594	900	650,000
Farmer Union GTA	425	463	125,000
Indiana Grain Cooperative	74	189	47,539
Farmers Grain Dealers Assn.	311	420	240,000
Union Equity	241	459	246,698
Producers Grain Corporation	² 121	175	² 43,750
Landmark	62	145	27,000
Gold Kist	43	43	4,900
Missouri Farmers Assn.	41	46	10,941
Ohio Farmers Grain Corp.	103	² 124	² 31,000
North Pacific Grain Growers	47	279	130,486
Riceland Foods	0	0	0
Michigan Elevator Exchange	71	71	18,750
Total	2,348	3,714	1,816,064

¹Duplicate membership has not been eliminated.

²Approximate.

member cooperatives and smaller line elevators. In addition, the 4 interregionals had 10 terminal elevators.

Storage capacity of the 340 local line elevators totaled 120 million bushels at the end of fiscal 1977, an average of about 350 thousand bushels per elevator. In comparison, the 3,700 member local elevators averaged 490 thousand bushels per elevator.

Terminals, Subterminals, and Processing Plants

Storage capacity of 95 terminals and subterminals for the 14 primary regionals was 430 million bushels (table 2). The 10 terminals of the 4 interregionals had total storage of 35 million bushels. Thus, the combined storage capacity of 105 terminals and subterminals for 18 regionals was 465 million bushels compared to 400 million at the end of fiscal 1975.

The terminal facilities mentioned above include storage capacity for 9 soybean

Table 2—Number and capacity of centrally controlled elevators for regional grain cooperatives, end of fiscal 1977

Regional cooperative	Local line elevators		Subterminals and terminals	
	Number	Capacity	Number	Capacity
		<i>1,000 bu.</i>		<i>1,000 bu.</i>
<i>Primary regionals:</i>				
Illinois Grain Corporation	0	0	6	3,712
Far-Mar-Co	0	0	16	128,774
Farmers Union GTA	147	25,000	20	62,503
Indiana Grain Cooperative	0	0	12	39,858
Farmers Grain Dealers Assn. ...	0	0	5	11,986
Union Equity	0	0	6	67,500
Producers Grain Corporation ...	0	0	5	37,239
Landmark	0	0	5	9,580
Gold Kist	42	10,182	3	18,000
Missouri Farmers Assn.	90	22,100	7	11,112
Ohio Farmers Grain Corp.	5	2,000	1	5,300
North Pacific Grain Growers ...	0	0	3	11,314
Riceland Foods	35	158,522	2	14,340
Michigan Elevator Exchange	21	1,700	4	8,550
Total	340	119,504	95	429,768
<i>Interregionals:</i>				
Farmers Export Co.	0	0	2	9,300
Mid-States Terminal	0	0	1	6,200
Kansas City Terminal Elev. Co. .	0	0	2	8,600
St. Louis Grain Corporation	0	0	5	10,945
Total	0	0	10	35,045
Grand total	340	119,504	105	464,813

¹Represents capacity used wholly or partially for storing and handling soybeans.

processing plants and 8 other grain processing plants, not including feed mills (appendix table 1).

Of the 465 million bushels of total storage capacity, 67 million bushels are at export locations, 56 million on navigable rivers, and 342 million at inland locations (fig. 2).

A capacity breakdown at inland locations reveals 280 million bushels at grain merchandising elevators, 33 million at soybean plant elevators, and 29 million at other grain processing plants.

Elevators Served by Water Transportation

Regionals located 35 of their terminal and subterminal elevators on navigable rivers or at port locations. Twenty-four elevators are on navigable rivers, four on the Great Lakes, four on the Gulf coast, one on the Pacific coast, and one on the Atlantic coast (appendix table 2).

Thus, cooperatives have significant port facilities in most important coastal areas and several elevators on the major navigable rivers. The storage capacity of these elevators located on water represents about 26 percent of regionals' total terminal grain storage capacity.

Leased and Owned Transportation Equipment

Hopper car usage for grain shipments has expanded greatly in recent years. Grain regionals shipping high volumes to ports found it necessary to have their own hopper cars. The number owned or leased by grain regionals peaked at 3,791 in 1975, decreased to 3,570 in 1976, and dropped again in 1977 (table 3). At the end of fiscal 1977, 10 regionals leased 2,516 hopper cars and one owned 115, a total of 2,631. Of this, 385 were leased for only 6 months, 110 were subleased, and some were used for processed grain products.

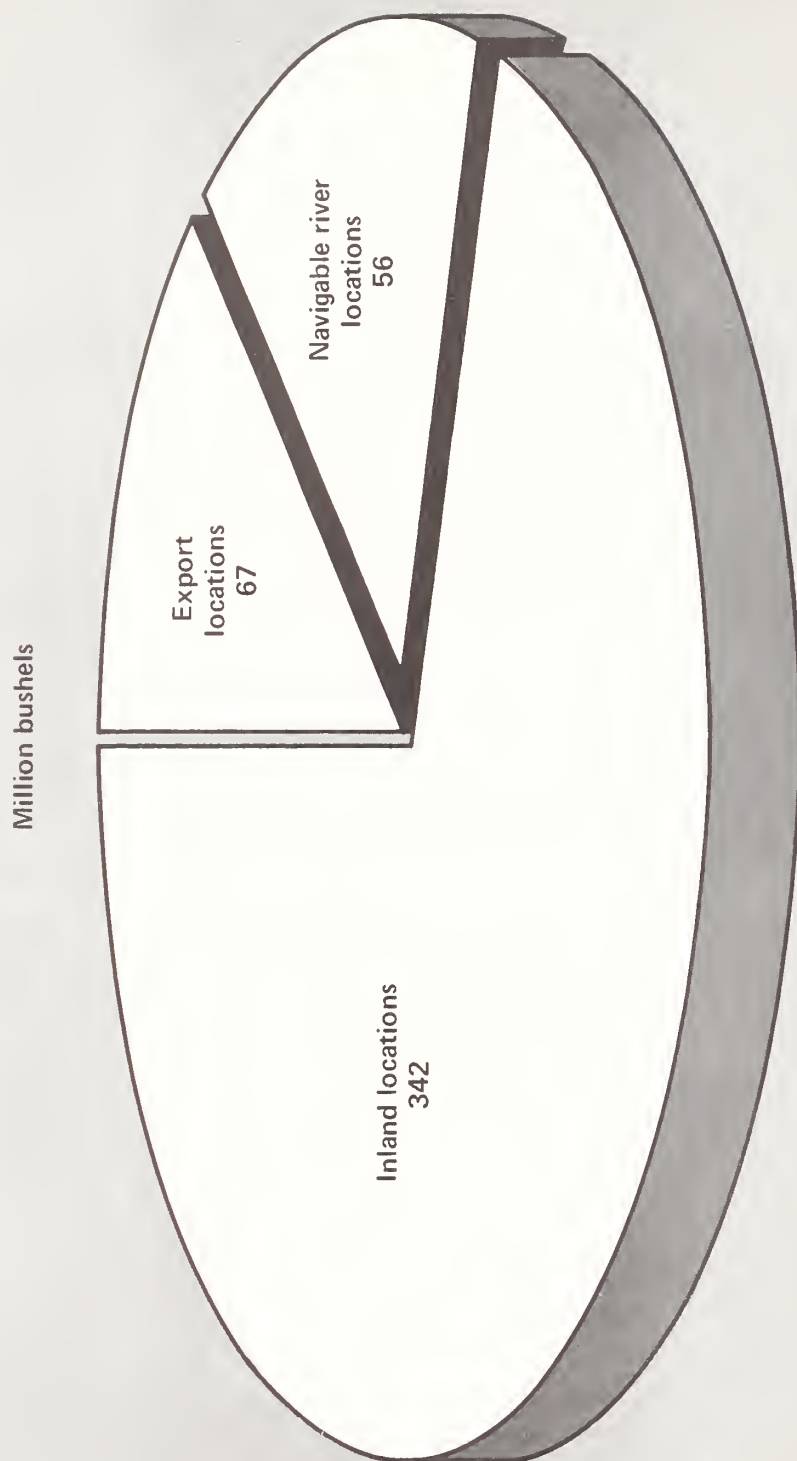
Table 3—Covered hopper cars leased¹ or owned, regional grain cooperatives, fiscal years 1975, 1976 and 1977

Regional cooperative	1975	1976	1977
<i>Number of cars</i>			
Farmers Grain Dealers Assn.	1,047	1,047	1,047
Far-Mar-Co Inc.	² 965	² 946	² 400
Farmers Union GTA	710	510	155
Indiana Grain Cooperative	550	550	530
Union Equity	100	100	100
Gold Kist	100	100	100
Producers Grain Corporation	125	125	125
Landmark	84	84	77
Mid-States Terminals	0	0	3
Michigan Elevator Exchange	60	58	51
Missouri Farmers Association	50	50	43
Total	3,791	3,570	2,631

¹Some were leased for a portion of the year.

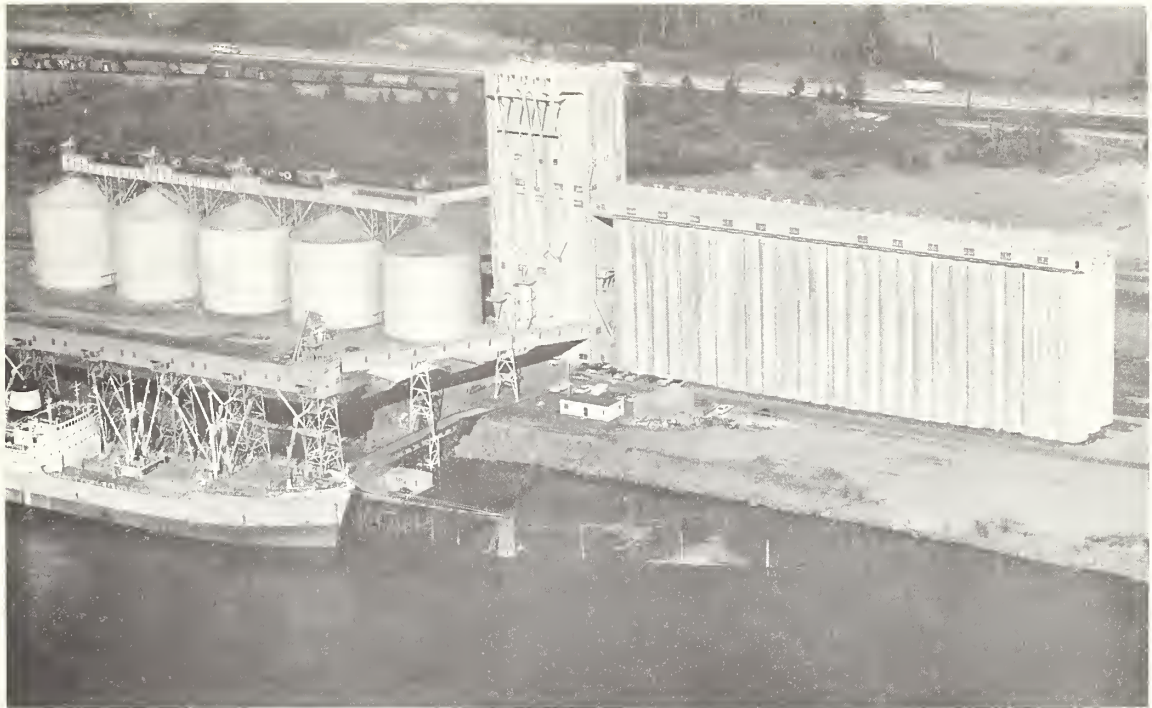
²Includes 115 hopper cars owned by Far-Mar-Co.

Figure 2 -- Storage capacity of 18 regional grain cooperatives, 1977*



* Excludes storage capacity in local line and affiliated member elevators.

Total capacity = 465



The port elevator at Kalama, Wash., operated by North Pacific Grain Growers, has a storage capacity of 4.1 million bushels and exports white wheat, hard winter wheat, hard spring wheat, durum, and barley. The 1.5-million-bushel Landmark subterminal at Sidney, Ohio, ships 100-car trains of grain to the East Coast for export.



Tank cars are used by regional grain cooperatives principally for the shipment of vegetable oil. In fiscal 1977, five regionals leased a total of 486 tank cars.

Barge shipments of grain account for a large portion of regionals' grain shipments, especially movements to port elevators near New Orleans and Portland. One regional leased two barges. Need for individual leasing of barges has diminished greatly because five regional grain cooperatives and CF industries jointly purchased a barge company in July 1974. They now operate 9 tow boats and own about 320 barges. The new cooperative, Agri-Trans Corp., headquartered in Long Grove, Illinois, barges grain down the Mississippi River and returns with fertilizer material.

Improvements And Changes—Recent And Proposed

During the 2 years since the last regional report, many of the 18 regional cooperatives have made significant changes in facilities; several have instituted organizational changes; and 3 have implemented marketing agreement programs.

Facility Improvements

For fiscal 1976 and 1977, the most significant improvements in facilities included, new and acquired storage capacity, dust and pollution control systems, and increased in and out handling capacity. Some regionals added new driers, scales, automatic samplers, and other equipment. Two regionals had major expansions of soybean plant facilities.

Illinois Grain Corporation added 300,000 bushels of storage capacity to their river elevator at Hennepin. A new 4.1 million bushel subterminal is under construction at Paxton, Illinois with the capacity of shipping unit trains to the East and Gulf coasts.

In fiscal 1976, Far-Mar-Co acquired new terminals in South Hutchinson, Kansas (1.1 million bushels) and Omaha, Nebraska (0.8 million). In fiscal 1977, Far-Mar-Co purchased a 21.5 million bushel terminal in Saginaw, Texas from Cook Industries.

Farmers Union Grain Terminal Association leased the St. Paul no. 2 elevator (1.1 million bushels) beginning in 1975. This terminal was expanded to 1.4 million bushels and the Winona river elevator expanded to 320,000 bushels in 1978.

Indiana Grain Cooperative, a division of Indiana Farm Bureau Cooperative Assn., purchased elevators from Queen City Grain Co. in Cincinnati in fiscal 1976. It includes river facilities with a 1.5 million bushel capacity and an inland elevator with a 250,000 bushel capacity. A 150,000 bushel elevator in New Albany, Indiana was also purchased, and a 140,000 bushel river facility in Louisville, Ky., was acquired by lease. In fiscal 1977, the Indianapolis terminal was expanded by 3.5 million to 12 million bushels, and a new 340,000 bushel river elevator was constructed at Evansville, Indiana.

Farmers Grain Dealers Association of Iowa expanded their Muscatine river elevator to 1.2 million bushels in fiscal 1976 and added complete rail unloading facilities including a rail siding for 50 cars. In fiscal 1977, the river elevator at McGregor increased its rail siding to handle 25 cars. In fiscal 1978, this elevator will expand its capacity by 690,000 bushels to 1.2 million bushels.

Union Equity Cooperative Exchange added 1.9 million bushels to its Houston, Texas export facility in fiscal 1977. Another 3 1/4 million bushels was also added to the Ft. Worth terminal.

Landmark, Inc. expanded storage capacity at Kenton, Ohio, to 1.5 million bushels. Land has been purchased for a barge loading facility at Silver Grove, Ky. Also, a train-loading elevator is planned for 1979 at Latty, Ohio.



The Grain Terminal Association river subterminal at Winona, Minn., has increased storage capacity to 320,000 bushels. Corn and soybeans are barged to the Gulf for export. The inland terminal near Ft. Worth, Texas, owned by Union Equity Cooperative Exchange, Enid, Okla., for the storage of wheat and grain sorghum, was recently expanded to 8.5 million bushels.



Gold Kist, Inc. purchased the 1,500 ton-per-day soybean processing plant at Marks, Mississippi from Cook Industries. Storage totaling over 1 million bushels was added at various country points in fiscal 1977 and similar growth is indicated for 1978.

Missouri Farmers Association expanded and modernized the soybean processing plant at Mexico, Missouri, increasing daily processing capacity to 1,500 tons a day. The subterminal at Lamar, Missouri will be expanded by 340,000 bushels in 1978.

Ohio Farmers Grain Corporation will expand their Fostoria, Ohio terminal to 6.5 million bushels capacity in 1978.

North Pacific Grain Growers expanded their Kennewick, Washington, river facility's capacity from 3.7 million to 5.3 million bushels.

Riceland Foods, Inc. added an oil bleaching facility at their soybean processing plant in Helena, Arkansas. Country elevator storage capacity for soybeans and rice has grown about 15 million bushels in the last 2 years. Riceland's marketing system has about 95 million bushels of storage capacity for soybeans and rice.

Michigan Elevator Exchange, a division of Farm Bureau Services, Lansing, Michigan, built a 2.0 million bushel addition to their terminal at Ottawa Lake, Michigan. The Saginaw terminal was rebuilt in 1978 following a fire and explosion in January 1976.

Farmers Export Co. purchased the 4.0 million bushel export elevator from Cook Industries in 1977. This facility is being rebuilt following an explosion on December 27, 1977.

Mid-States Terminals increased their storage capacity at the Port of Toledo to 6.2 million bushels in 1977, and recently announced plans for further expansion to about 9 million bushels. Also, a second ship loading dock will be added. With the current expansion program, the original Norris elevators—built in 1900—will be razed.

Organizational Changes

The most significant change in this period was the merger of Far-Mar-Co with Farmland Industries, which occurred in early 1977. About 95 percent of Far-Mar-Co's member cooperatives were also members of Farmland. Far-Mar-Co will now be operated as a subsidiary corporation of Farmland. The merger benefits members by eliminating overlapping programs, coordinating programs, reducing expenses, and expanding certain programs.

Far-Mar-Co opened a Los Angeles grain merchandising office in August 1977. The new office will be active in both domestic and export sales. This follows a similar move by Farmers Union Grain Terminal Association who opened a branch office at Portland, Oregon in July 1975.

In 1976, Farmers Export Co. opened a sales office in Japan. This is indicative of the continuing effort by cooperatives to expand export sales, particularly direct exports.

GTA purchased Holsum Foods, a food processing firm headquartered at Waukesha, Wisconsin. It is operated by the Honeyamead Division of GTA.

FGDA, Farmers Grain Dealers Association set up a new subsidiary, Farmers Commodities Corporation, to take over the commodity futures department. This was done to operate more efficiently under the rules and regulations of the Commodities Futures Trading Commission.

Indiana Farm Bureau Cooperative Association became a member of Farmers Export Co., Overland Park, Kansas, in 1977. Farmers Export Company's membership now includes Farmers Grain Dealers Association of Iowa, Farmers Union Grain Terminal

Association, Far-Mar-Co Inc., Illinois Grain Corporation, MFC Services, Missouri Farmers Assn., Indiana Farm Bureau Cooperative Assn., St. Louis Grain Corporation, and Kansas City Terminal Elevator Co.

New Marketing Programs

Beginning with the 1976 crop of wheat, Far-Mar-Co instituted a new cooperative market pooling program called PROMARK. About 33 million bushels were placed in the program by more than 15,000 producers. For the 1977 crop, about 37 million bushels from 18,000 producers were in the program. The program called for a three-way marketing agreement involving the producer, Far-Mar-Co, and the local cooperative. About 350 local cooperatives participated in the program. Net returns to producers from the 1976 crop pool were generally satisfactory. Some reports indicated that producers received 15 to 25 cents a bushel more for their wheat than the average for wheat sold at local cooperatives. Final payment for the 1977 pool was made in late 1978.

Farmers Grain Dealers Association began a similar program for the 1976 corn crop called the Planned Marketing Program. This program involved a dual marketing agreement. The first agreement was between FGDA and participating local cooperatives; the second between the local cooperative and its individual producer members. A total of 196 local cooperatives agreed to offer the program to their producers. The program was also offered for the 1977 corn crop.

Farmers Union Grain Terminal Association also offered a new marketing agreement program for the 1976 crops of corn, spring wheat, durum, and Montana winter wheat. Program participation was relatively low and it was discontinued in 1977.

Total Grain Volume And Disposition

The annual volume of grain handled by 18 regional grain cooperatives increased from 1.6 billion bushels in 1974 to 1.9 billion in 1976 and held at 1.8 billion in 1977 (fig. 3). Subsequent analysis herein will show the volume of regionals has kept pace with the increase in farm sales and exports of grain.

The data provided is for 14 regional grain cooperatives and 4 interregional grain cooperatives. The combined total for these 18 regionals reflects the elimination of duplicate volume and the purchase of nonmember grain by the interregionals.

Volume by Type of Outlet

Primary Regionals

The volume handled by the 14 primary regionals was 1.9 billion bushels in 1976 and 1.8 billion in 1977 (table 4). This was only slightly less than the combined totals for all 18 regionals. Domestic disposition to cooperatives' own processing plants and to domestic sales outlets totaled about 880 million bushels in both 1976 and 1977.

Soybeans was the principal grain processed in regionals' own plants. Eight soybean processing plants were operated by six of the primary regionals (appendix table 1). Smaller quantities of barley, sunflower seed, wheat, and flax were also processed. Data on grain processed into feeds was not obtained.

The export disposition of the primary regionals reached a high of 1.0 billion bushels in 1976 and dropped only slightly in 1977 to 0.9 billion bushels. Direct exports in 1977 were 77 million bushels, down slightly from 84.3 million in 1976. The total amount of grain shipped through regionals' own cooperative export elevators was 530 million bushels in 1977, 61 percent of the 14 primary regionals' export disposition.

Figure 3 -- Total grain volume and disposition of 18 regional grain cooperatives, 1974-77

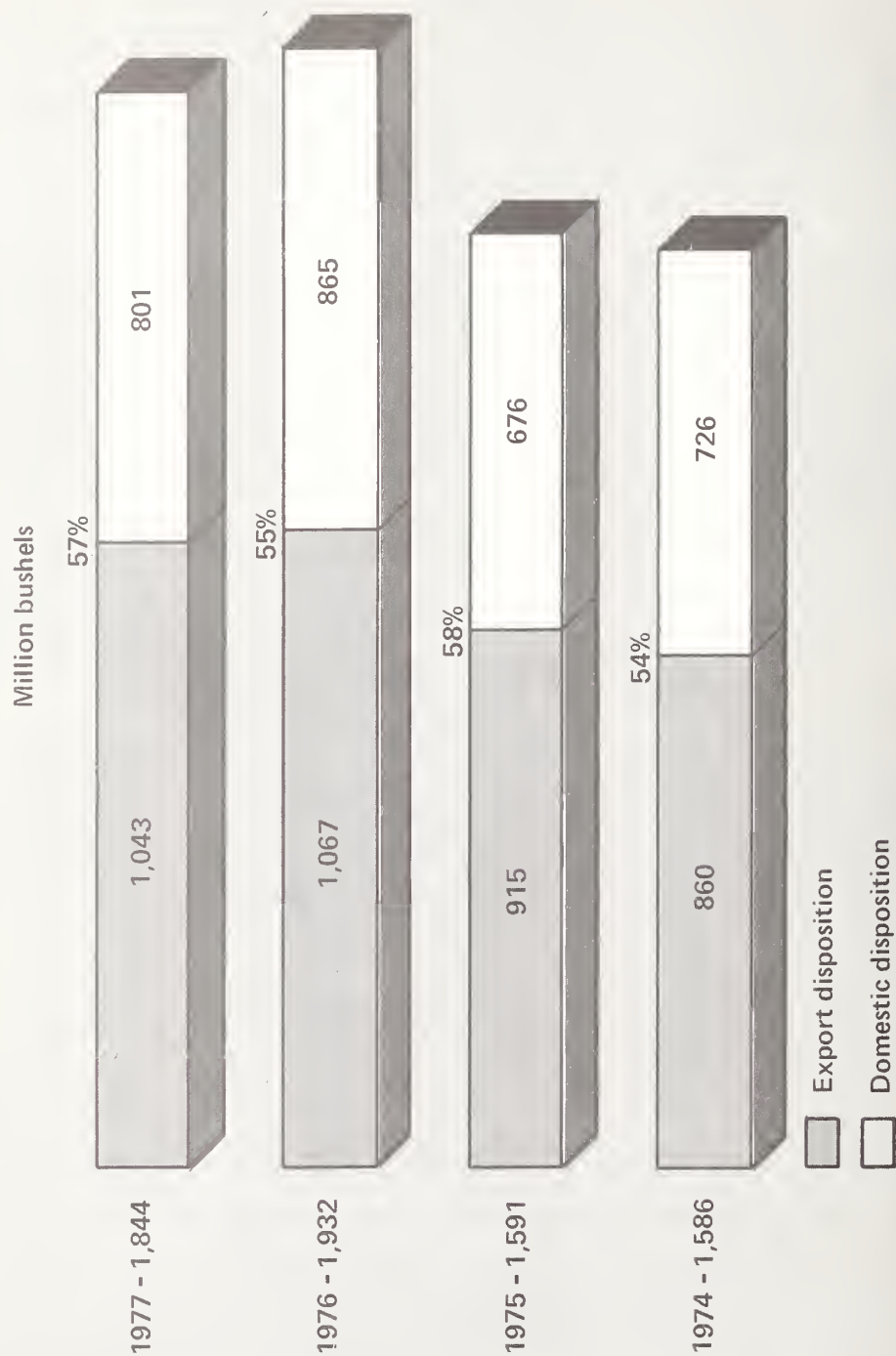


Table 4—Grain disposition by type of outlet for 14 primary regional grain cooperatives and 4 interregionals, fiscal years ending 1976 and 1977

Type of outlet	1976	1977
<i>Million bushels</i>		
14 primary regionals		
Processed in own plant	138.8	140.7
Domestic sales	741.9	738.2
Total domestic disposition	880.7	878.9
Export disposition ¹ :		
Controlled to ship:		
Direct exports ²	84.3	76.9
Indirect exports	509.4	453.0
Total controlled	593.7	529.9
Other indirect exports ³	420.6	343.7
Total export disposition	1,014.3	873.6
Total disposition	1,895.0	1,752.5
4 interregionals ⁴		
Domestic sales	80.5	19.2
Export disposition ¹ :		
Controlled to ship:		
Direct exports ²	205.1	310.0
Indirect exports	67.6	77.1
Total controlled	272.7	387.1
Other indirect exports ³	34.8	83.0
Total export disposition	307.5	470.1
Total disposition	388.0	489.3
Total net disposition—18 regionals ⁵		
Processed in own plant	138.8	140.7
Domestic sales	726.4	660.3
Total domestic disposition	865.2	801.0
Export disposition ¹ :		
Controlled to ship:		
Direct exports ²	289.4	386.9
Indirect exports	327.2	228.6
Total controlled	616.6	615.5
Other indirect exports ³	450.6	427.1
Total export disposition	1,067.2	1,042.6
Total net disposition	1,932.4	1,843.6

¹Export disposition means the total grain shipped to a port position. The portion that regionals control all the way aboard a ship includes both direct and indirect exports.

²Direct exports represent volume sold directly to a foreign buyer and usually handled through a co-op port elevator.

³Other indirect exports represent movements to nonco-op port elevators.

⁴The volume of these cooperatives largely originates from the 14 primary regionals.

⁵This reflects the elimination of duplicate volume between regionals, adjustments for final regional disposition, and additions for nonmember volume of interregionals.

Interregionals

The 4 interregionals serving member regionals handled a total volume of 388 million bushels in 1976 and 489 million in 1977, a sharp increase each year. Direct exports, which were well over one-half of their export disposition, accounted for much of the increase.

Combined Volume

The flow of grain through the 18 regionals in 1976 and 1977 was 21 percent and 16 percent higher, respectively, than in 1974 (appendix table 3). In 1977, about 43 percent of the grain was sold domestically and the remainder was shipped to ports for exportation. Comparing 1977 to 1974, export sales volume increased 21 percent and domestic sales increased 10 percent.

Volume by Kind of Grain

In 1977, corn was the leading grain handled by the 18 regionals—totaling 695 million bushels (fig. 4). Wheat ranked next with a volume of 571 million; followed by soybeans, 354 million; sorghum, 130 million; barley, 55 million; oats, 18 million; and other grains, 6 million bushels.

Primary Regionals

Corn and wheat made up nearly 70 percent of the total grain volume handled by the 14 primary regionals in 1976 and 1977 (table 5). Soybeans comprised nearly 20 percent each year and grain sorghum 7 percent. The remainder was divided between barley, oats, sunflower seed, flaxseed, and rye. The volume of sunflower seed handled in 1977 increased sharply even though farm sales of sunflower seed did not increase.

Interregionals

Corn provided 46 percent of the volume of the four interregionals in 1977 compared to 49 percent in 1976. Corn's percentage share decreased recently, even though corn volume increased each year. In contrast, the percentage share for wheat increased sharply. In 1977, wheat volume made up 25 percent of interregionals' volume compared to 19 percent in 1976. Soybean volume increased less than corn in recent years and made up 24 percent of the volume in 1977 compared to 30 percent in 1976. The volume of grain sorghum handled in 1977 increased sharply even though total U.S. farm sales of sorghum did not increase.

Combined Volume

The combined volume of the 18 regionals in 1976 was 37 million bushels greater than for the 14 primary regionals. In 1977 it was 91 million bushels greater.

Net disposition of corn and wheat together totaled about 1.3 billion bushels in both 1976 and 1977. This represents about 69 percent of total volume. In comparison, the volume for corn and wheat in 1974 was 1.0 million bushels and the volume share was 64 percent (appendix table 4). Since 1974, the volume of sorghum and soybeans increased only slightly. In 1977, soybeans comprised 19 percent of volume and sorghum 7 percent. Thus, the four major grains made up 94 percent of total volume.

Figure 4 -- Volume of grain handled by 18 regional grain cooperatives, fiscal year ending 1977

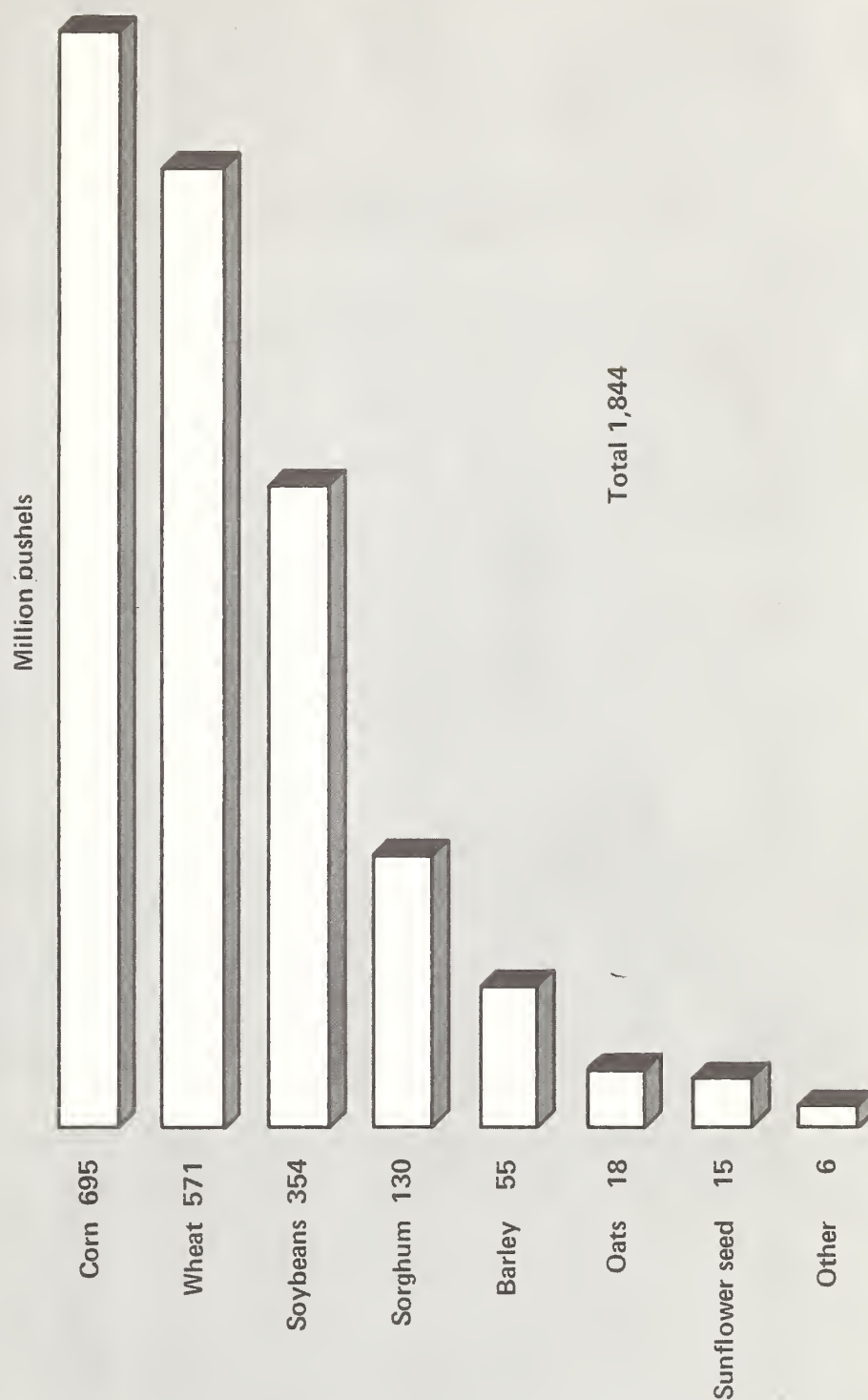


Table 5—Grain disposition (sold or processed) by kind of grain, 14 primary regional grain cooperatives and 4 interregionals, fiscal years ending 1976 and 1977

Kind of grain	1976	1977
<i>Million bushels</i>		
Primary regionals:		
Wheat	642.7	529.2
Corn	678.0	665.0
Oats	25.7	18.2
Barley	45.2	54.9
Sorghum	130.2	121.9
Soybeans	360.6	342.4
Rye	2.3	1.5
Flaxseed	5.9	4.2
Sunflower seed	4.4	15.2
Total	1,895.0	1,752.5
Interregionals:		
Wheat	74.6	120.2
Corn	191.1	225.8
Oats	4.4	1.7
Sorghum	0.6	25.4
Soybeans	117.3	116.2
Total	388.0	489.3

Regionals' Volume as a Percent of Farm Sales

The primary regionals' share of farm grain sales was determined by comparing U.S. farm sales of each major grain with the regionals' sale volume. Regionals' sales of 1.9 and 1.8 billion bushels in fiscal 1976 and 1977, respectively, were considerably above the 1974 and 1975 levels of 1.6 billion bushels (table 6). Likewise, U.S. farm sales of grain were at a higher level in crop years 1975/76 and 1976/77.

The months covered by the fiscal years for regionals and the crop years for U.S. farm sales do not precisely correspond, but they do provide the best available measure of the regionals' share.

Farm grain sales peaked in crop year 1975/76 at 8.4 billion bushels and dropped to 8.3 billion in 1976/77. The cooperative share as expressed in the ratio of regionals' sales to U.S. farm sales declined slightly from 23 percent in 1974/75 to 21 percent in 1976/77.

The primary regional cooperatives' share for each kind of grain handled in fiscal 1977 was highest for soybeans and wheat, followed in order by sorghum, barley, corn, and oats (table 7). Since 1970, wheat sales of regionals comprised the highest share of farm sales of the major grains (table 8). For 1977, cooperatives handled record shares of barley, sorghum, and soybeans.

Table 6—Farm grain sales, regional cooperative sales and percent of farm sales handled by 14 primary regional grain cooperatives, fiscal years 1970 through 1977¹

Fiscal year ending	Crop years	U.S. farm sales ²	Regional cooperative sales ³	Regional sales as a percent of farm sales
		<i>Million bushels</i>		<i>Percent</i>
1970	1969-70	6,300	1,118	17.7
1971	1970-71	5,886	1,165	19.7
1972	1971-72	7,229	1,205	16.7
1973	1972-73	7,212	1,624	22.5
1974	1973-74	7,942	1,559	19.6
1975	1974-75	6,775	1,561	23.0
1976	1975-76	8,429	1,895	22.5
1977	1976-77	8,297	1,752	21.1

¹Includes following grains: wheat, corn, oats, barley, sorghum, soybeans, rye, and flaxseed.

²Reflects crop years closely corresponding to fiscal years.

³Data for fiscal years 1970, 1971, and 1972 are approximate.

Table 7—Comparison of total U.S. farm grain sales and sales by 14 primary regional grain cooperatives, 1976 crop year and 1977 fiscal year, respectively

Kind of grain	U.S. farm grain sales, 1976 crop	Sales by regional cooperatives	Regional cooperative share
	<i>Million bushels</i>		<i>Percent</i>
Wheat	2,038	529	26.0
Corn	3,961	665	16.8
Oats	193	18	9.3
Barley	274	55	20.0
Sorghum	513	122	23.8
Soybeans	1,264	342	27.1
Other ¹	54	21	38.9
Total	8,297	1,752	21.1

¹Includes rye, flaxseed, and sunflower seed.

Table 8—Proportion of total farm grain sales handled by 14 primary regional grain cooperatives, fiscal years 1972-77¹

Kind of grain	Fiscal year					
	1972	1973	1974	1975	1976	1977
<i>Percent of farm sales</i>						
Wheat	27.2	39.7	28.7	35.7	31.7	26.0
Corn	11.9	16.1	15.7	17.5	18.2	16.8
Oats	9.1	15.7	19.2	13.7	10.5	9.3
Barley	10.7	14.6	16.1	17.9	16.5	20.0
Sorghum	17.2	21.4	19.7	22.2	22.6	23.8
Soybeans	22.3	23.0	19.3	21.2	23.6	27.1
Other grains	15.8	31.6	27.8	28.5	18.0	38.9
Total	16.6	22.5	19.6	23.0	22.5	21.1

¹Farm grain sales were for crop years closely corresponding to fiscal years.

Export Disposition

Grain shipments from the 18 regional grain cooperatives to export elevators totaled 1,067 million bushels in fiscal 1976 and 1,042 million in 1977. This compared with 860 million in 1974, and 915 million in 1975. Since 1974, regionals have increased their disposition to export elevators by over 20 percent and have maintained their share of originations for export at about 28 to 30 percent of U.S. exports. All grains have contributed to this increased volume, especially corn. (appendix table 5).

Percent of Regionals' Grain Shipped to Port Areas

For several years grain regionals have shipped more than half of their total volume to ports for export. In fiscal 1977, the 18 regionals handled a total volume of 1.8 billion bushels and shipped 1.0 billion to ports, 57 percent of total volume (table 9). For wheat, the percentage shipped to ports was 66 percent, for corn 56 percent, sorghum 74 percent, and soybeans 46 percent.

Table 9—Total volume handled and movement to port areas for export, 18 grain cooperatives, fiscal year 1977

Kind of grain	Total net volume handled	Movements to port areas	Percent moved to port areas	
			1977	1976
<i>Million bushels</i>			<i>Percent</i>	
Wheat	571.1	374.5	65.6	65.1
Corn	694.4	388.9	56.0	55.8
Sorghum	129.9	96.7	74.4	70.2
Soybeans	354.3	163.4	46.1	39.4
Other grains	93.9	19.1	20.3	24.1
Total	1,843.6	1,042.6	56.6	55.4

A significant amount of this grain was shipped by regionals to cooperative port elevators and sold for export. Other grain was sold by regionals at inland cooperative elevators to noncooperative buyers who shipped the grain to other port elevators. The total of such movements originating with cooperatives made up our data on export shipments or movements for regional cooperatives.

Shipments to Co-op and Nonco-op Export Elevators

In 1977, 6.5 million bushels, or 59 percent of the regionals total grain shipments to port areas, moved to cooperative export elevators (figure 5). The percentage of grain "controlled to ship" through cooperative export elevators has remained rather constant at 57 to 59 percent for the last 4 years.

In 1977, the proportion of total co-op export movement that went to co-op export elevators was highest for sorghum and soybeans—78 and 65 percent, respectively (fig. 6). However, from the standpoint of volume, wheat and corn accounted for two-thirds of co-op "controlled to ship" movements for export.

The volume of grains that moved to nonco-op export elevators totaled 428 million bushels, or 41 percent of total co-op export movement (appendix table 6). This volume is roughly equivalent to the throughput volume of three or four export elevators.

Shipments to Specific Port Areas

The largest volume of grain shipments to port areas by regionals in 1977 was to Gulf ports—717.1 million bushels or 69 percent of the total (table 10). Next in order of importance were shipments to the Atlantic totaling 137.2 million bushels, Great Lakes shipments of 106.0 million, and shipments to the Pacific of 82.3 million. Of the Gulf shipments, wheat and corn each made up 36 percent of the total. For Great Lakes shipments, corn and wheat were also most important. Almost all Pacific Coast shipments were wheat. For the Atlantic, corn made up 71 percent of shipments and soybeans about 23 percent of total.

The regionals' share of export movements to the Atlantic coast was estimated to be 27.5 percent, about double the share in 1975 (table 10). The regionals' shares for the Gulf and Lakes were 31.5 and 31.4 percent respectively—both down from 1975. The 23.4 percent share in the Pacific was only slightly lower than in 1975. Regionals' overall share of U.S. grain export movements was estimated at 30.1 percent.

Figure 5 -- Export disposition: Shipments to co-op and nonco-op export elevators, 18 regional grain co-ops, 1974-77

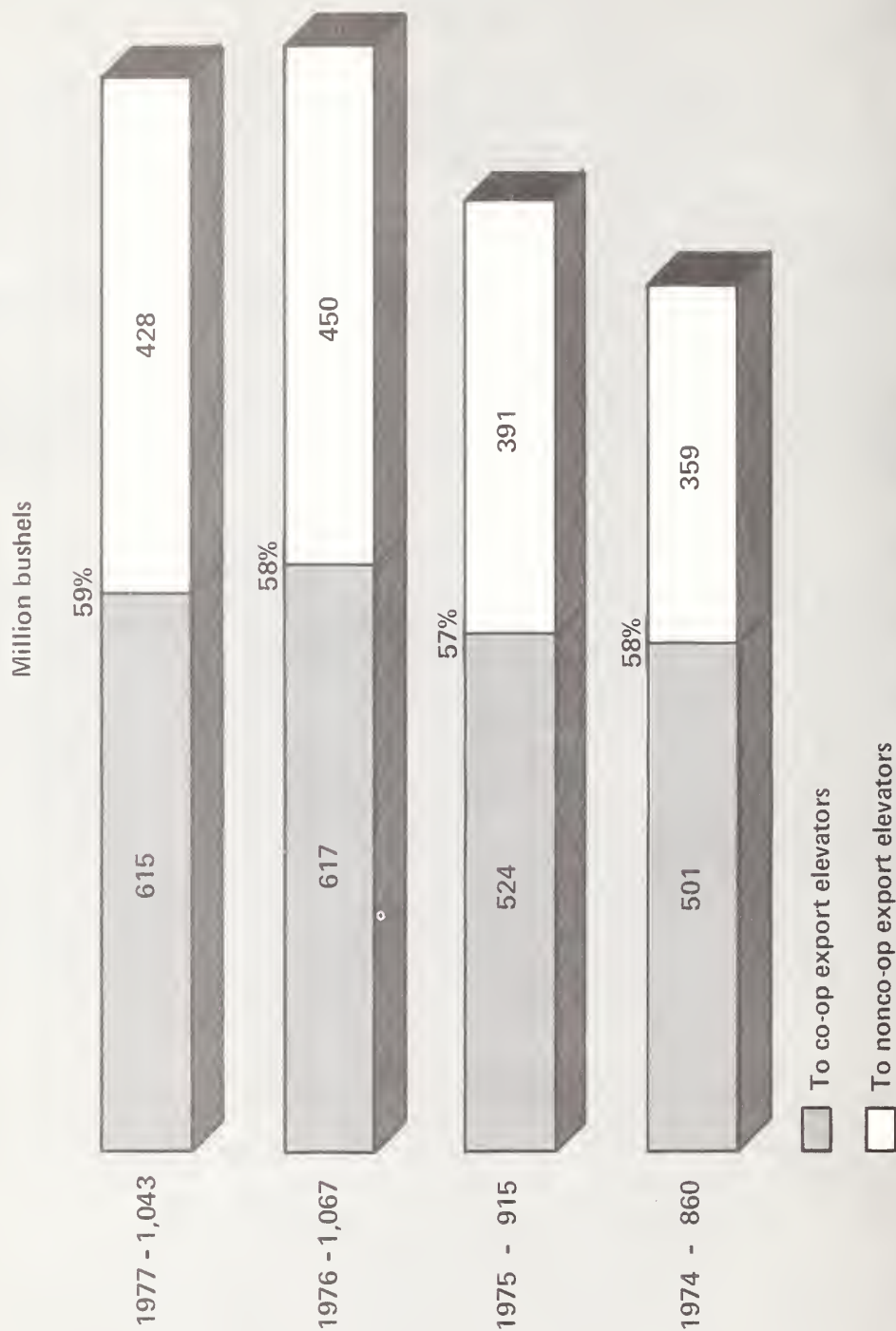


Figure 6 -- Volume shipped by regionals to co-op and nonco-op export elevators, by kind of grain, fiscal year 1977

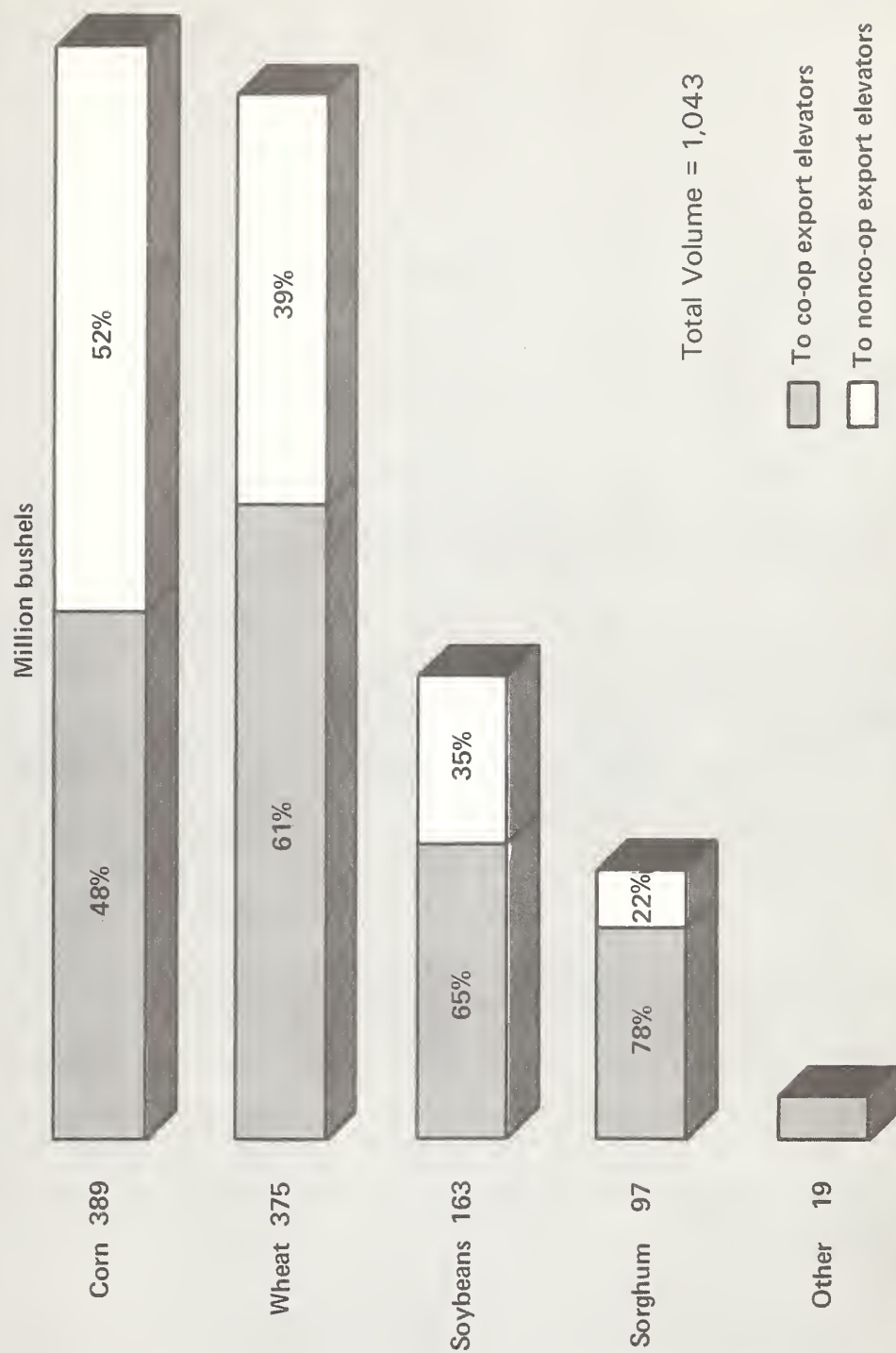


Table 10—Grain shipments originated by regional cooperatives to port areas for fiscal 1977,
and average U.S. grain exports for calendar years 1976 and 1977

Kind of grain	Port area				
	Atlantic	Gulf	Lakes	Pacific	Total
<i>Million bushels</i>					
Grain shipments of regionals:					
Wheat	7.2	259.8	27.5	80.0	374.5
Corn	97.7	256.1	34.8	0.3	388.9
Sorghum	—	95.7	0.8	0.2	96.7
Soybeans	31.9	105.1	26.4	—	163.4
Other	0.4	0.4	16.5	1.8	19.1
Total	137.2	717.1	106.0	82.3	1,042.6
Total U.S. exports:					
Calendar 1976	534.5	2,329.0	309.1	387.9	3,560.5
Calendar 1977	462.1	2,222.5	366.1	316.7	3,367.4
Average	498.3	2,275.8	337.6	352.3	3,464.0
<i>Percent</i>					
Regionals' shipments as a percent of U.S. exports ¹	27.5	31.5	31.4	23.4	30.1

¹Average annual U.S. exports for calendar years 1976 and 1977 were used since the ending fiscal years of regionals ranged from April 30 to December 31.

**Appendix table 1—Location and storage capacity of grain terminals and subterminals,
regional grain cooperatives, 1977**

Regional name and location	Facility code ¹	Location and facilities	Storage capacity ²
			<i>1,000 bu.</i>
Primary regionals:			
Far-Mar-Co			
Hutchinson, Kans.	H		
	E	Hutchinson, Kans.	23,905
	E	South Hutchinson, Kans. (1976)	1,055
	E	Wichita, Kans.	10,423
	E	Rock Bluff, Nebr.	258
	E	Denver, Colo.	6,051
	E	Fremont, Nebr.	2,146
	E	Topeka, Kans.	12,055
	E	Kansas City, Kans.	10,508
	E	Lincoln, Nebr.	14,607
	E	Omaha, Nebr.	4,266
	E	Hastings, Nebr.	15,000
	E	Saginaw, Tex. (1977)	21,500
	S	St. Joseph, Mo.	<u>7,000</u>
		Total	128,774
Farmers Grain Dealers Association			
Des Moines, Iowa	H		
	E	Des Moines, Iowa	8,328
	S	Mason City, Iowa	1,050
	E	Meekers Landing, Iowa	861
	E	McGregor, Iowa	3510
	E	Muscatine, Iowa	<u>1,237</u>
		Total	11,986
Farmers Union Grain Terminal Association			
St. Paul, Minn.	H		
	E	St. Paul, Minn. (No. 1)	5,300
	E	St. Paul, Minn. (No. 2)	31,088
	E	Minneapolis, Minn. (Elev. M)	1,300
	E	Superior, Wisc.	18,400
	E	Winona, Minn.	3145
	E	Shelby, Mont.	870
	E	Lewiston, Mont.	500
	E	Great Falls, Mont.	630
	E	Sioux City, Iowa	850
	E	Janesville, Minn.	270
	E	Madelia, Minn.	300
	E	Mountain Lake, Minn. (1976)	300
	S	Mankato, Minn.	4,000
	P	Minneapolis, Minn. (Union Elev.)	1,200
	P	Fidley, Minn.	2,700
	P	Winona, Minn.	4,800

See footnotes at end of table.

Continued

**Appendix table 1—Location and storage capacity of grain terminals and subterminals,
regional grain cooperatives, 1977—Continued**

Regional name and location	Facility code ¹	Location and facilities	Storage capacity ²
			<i>1,000 bu.</i>
	P	Milwaukee, Wisc.	14,900
	P	Chicago, Ill.	3,300
	P	Wahpeton, N.D. (1976)	1,250
	P	Rush City, Minn.	400
		Total	62,503
Gold Kist, Inc. Atlanta, Ga.	H		
	S	Valdosta, Ga.	6,000
	S	Decatur, Ala.	7,000
	S	Marks, Miss.	<u>45,000</u>
		Total	18,000
Indiana Grain Division Indianapolis, Ind.	H		
	E	Indianapolis, Ind.	12,000
	E	Princeton, Ind.	1,500
	E	Louisville, Ky.	2,100
	E	Baltimore, Md.	4,000
	E	Chicago, Ill.	7,795
	E	Red Key, Ind.	5,250
	E	Logansport, Ind.	5,000
	E	Cincinnati, Ohio (1976)	1,733
	E	Louisville, Ky. (1976)	140
	E	Evansville, Ind. (1977)	<u>340</u>
		Total	39,858
Illinois Grain Corporation Bloomington, Ill.	H		
	E	Morris, Ill.	550
	E	Hennepin, Ill.	490
	E	Lacon, Ill.	190
	E	Creve Coeur, Ill.	1,470
	E	Havana, Ill.	720
	E	Naples, Ill.	<u>292</u>
		Total	3,712
Landmark, Inc. Columbus, Ohio	H		
	E	Columbus, Ohio	5,550
	E	Sidney, Ohio	1,450
	E	Kenton, Ohio	1,500
	E	Lima, Ohio	500
	E	Wooster, Ohio	<u>580</u>
		Total	9,580

continued

**Appendix table 1—Location and storage capacity of grain terminals and subterminals,
regional grain cooperatives, 1977—Continued**

Regional name and location	Facility code ¹	Location and facilities	Storage capacity ²
			<i>1,000 bu.</i>
Michigan Elevator Exchange Lansing, Mich.	H		
	E	Ottawa Lake, Mich.	6,000
	E	Saginaw, Mich.	2,000
	E	Maryville, Mich.	300
	P	Quincy, Mich.	250
		Total	8,550
Missouri Farmers Assn. Columbia, Mo.	H		
	S	Mexico, Mo.	3,068
	E	Lousiana, Mo.	2,646
	E	Hannibal, Mo.	1,383
	E	Caruthersville, Mo.	1,908
	E	Hull, Ill.	1,083
	E	Lamar, Mo.	³ 780
	E	Hayti, Mo.	244
		Total	11,112
North Pacific Grain Growers, Inc. Portland, Oreg.	H		
	E	Kalama, Wash.	4,152
	E	Kennewick, Wash.	5,300
	E	Spokane, Wash.	1,862
		Total	11,314
Ohio Farmers Grain Corporation Fostoria, Ohio	H		
	E	Fostoria, Ohio	5,300
Producers Grain Corporation Amarillo, Tex.	H		
	E	Amarillo, Tex.	11,448
	E	Plainview, Tex.	4,826
	E	Lubbock, Tex.	8,073
	E	Fort Worth, Tex.	6,500
	E	Corpus Christi, Tex.	6,392
		Total	37,239
Riceland Foods, Inc. ⁵ Stuttgart, Ark.	H		
	S	Stuttgart, Ark.	7,147
	S	Helena, Ark.	7,193
		Total	14,340

**Appendix table 1—Location and storage capacity of grain terminals and subterminals,
regional grain cooperatives, 1977—Continued**

I Regional name and location	Facility code ¹	Location and facilities	Storage capacity ²
			1,000 bu.
Union Equity Cooperative Exchange Enid, Okla.	H		
	E	Enid, Okla.	50,500
	E	Fort Worth, Tex.	8,500
	E	Houston, Tex.	8,500
		Total	67,500
		Total for primary regionals	429,768
<i>Interregionals:</i>			
Farmers Export Company Overland Park, Kans.	H		
	E	Ama, La.	5,300
	E	Galveston, Tex.	64,000
Kansas City Terminal Elevator Co. Kansas City, Mo.	H		
	E	Kansas City, Mo.	8,600
Mid-States Terminal, Inc. Toledo, Ohio	H		
	E	Toledo, Ohio	16,200
St. Louis Grain Corp. St. Louis, Mo.	H		
	E	St. Louis, Mo.	10,945
		Total for interregionals	35,045
Grand total for 18 regionals			464,813

¹Facility code: (H) headquarters office, (E) elevator, (S) soybean processing plant, (P) other processing plant.

²Storage capacity does not include country grain elevators owned by or affiliated with regionals.

³Construction of additional storage capacity in progress.

⁴Acquired July 1977.

⁵Storage capacity shown for Riceland Foods, Inc. includes only the capacity of 2 large terminals used for soybeans. The total marketing system of Riceland has about 95 million bushels of capacity for both soybeans and rice in country elevators and terminals.

⁶Construction in progress after December 27, 1977 explosion.

Appendix table 2—Location of terminal grain facilities on water, fiscal 1977

Name of regional cooperative and location of elevators	River, lake, or coast location	Storage capacity <i>1,000 bu.</i>
<i>Primary regionals:</i>		
Far-Mar-Co		
Hutchinson, Kans		
Rock Bluff, Nebr.	Missouri R.	258
Kansas City, Kans.	Missouri R.	<u>10,508</u>
Total		10,766
Farmers Grain Dealers Assn. of Iowa		
Des Moines, Iowa		
McGregor	Mississippi R.	510
Meekers Landing	Mississippi R.	861
Muscatine	Mississippi R.	<u>1,237</u>
Total		2,608
Farmers Union Grain Terminal Assn.		
St. Paul, Minn.		
St. Paul, Minn. (no. 1)	Mississippi R.	5,300
St. Paul, Minn. (no. 2)	Mississippi R.	1,083
Superior, Wis.	Lake Superior	18,400
Winona, Minn.	Mississippi R.	<u>1145</u>
Total		24,928
Indiana Grain Cooperative		
Indianapolis, Ind.		
Baltimore, Md.	Atlantic coast	4,000
Chicago, Ill.	Lake Michigan	7,795
Cincinnati, Ohio	Ohio R.	1,400
Louisville, Ky.	Ohio R.	140
Evansville, Ind.	Ohio R.	<u>340</u>
Total		13,675
Illinois Grain Corporation		
Bloomington, Ill.		
Morris	Illinois R.	550
Hennepin	Illinois R.	490
Lacon	Illinois R.	190
Creve Coeur	Illinois R.	1,470
Havana	Illinois R.	720
Naples	Illinois R.	<u>292</u>
Total		3,712
Michigan Elevator Exchange		
Lansing, Mich.		
Saginaw	Lake Huron	2,000

Continued

Appendix table 2—Location of terminal grain facilities on water, fiscal 1977—Continued

Name of regional cooperative and location of elevators	River, lake, or coast location	Storage capacity <i>1,000 bu.</i>
Missouri Farmers Association		
Columbia, Mo.		
Caruthersville	Mississippi R.	1,908
Hannibal	Mississippi R.	1,383
Louisiana	Mississippi R.	<u>2,646</u>
Total		5,937
North Pacific Grain Growers		
Portland, Oreg.		
Kalama, Wash.	Pacific coast	4,152
Kennewick, Wash.	Columbia R.	<u>5,300</u>
Total		9,452
Producers Grain Corporation		
Amarillo, Tex.		
Corpus Christi	Gulf	6,392
Riceland Foods, Inc.		
Stuttgart, Ark.		
Helena	Mississippi R.	7,193
Union Equity Cooperative Exchange		
Enid, Okla.		
Houston, Tex.	Gulf	<u>8,500</u>
Total for primary regionals		95,163
<i>Interregionals:</i>		
Farmers Export Company		
Overland Park, Kans.		
Ama. La.	Gulf	5,300
Galveston, Tex.	Gulf	² 4,000
Kansas City Terminal Elevator		
Kansas City, Mo.	Missouri R.	4,200
Mid-States Terminal Elevator		
Toledo, Ohio	Lake Erie	6,200
St. Louis Grain Corporation		
St. Louis, Mo.	Mississippi R.	<u>7,830</u>
Total for interregionals		<u>27,530</u>
Grand total		122,693

¹Construction of additional storage capacity in progress.²Construction in progress after December 27, 1977 explosion.

Appendix table 3—Total net disposition by type of outlet for 18 regional grain cooperatives,¹ fiscal years 1974-77

Type of outlet	1974	1975	1976	1977
<i>Million bushels</i>				
Processed in own plant	116	112	139	141
Domestic sales	<u>610</u>	<u>564</u>	<u>726</u>	<u>660</u>
Total domestic disposition	726	676	865	801
Export disposition: ²				
Controlled to ship				
Direct exports ³	252	251	289	387
Indirect exports	<u>248</u>	<u>272</u>	<u>327</u>	<u>229</u>
Total controlled	500	523	616	616
Other indirect exports ⁴	<u>360</u>	<u>392</u>	<u>451</u>	<u>427</u>
Total export disposition	<u>860</u>	<u>915</u>	<u>1,067</u>	<u>1,043</u>
Total net disposition	1,586	1,591	1,932	1,844

¹This reflects the elimination of duplicate volume between regionals, adjustments for final regional disposition, and additions for nonmember volume of interregionals.

²Export disposition means the total grain shipped to a port position. The portion that regionals control all the way aboard a ship includes both direct and indirect exports.

³Direct exports represent volume sold directly to a foreign buyer and usually handled through a co-op port elevator.

⁴Other indirect exports represent movements to nonco-op port elevators.

Appendix table 4—Total net disposition by kind of grain for 18 regional grain cooperatives¹, fiscal years 1974-77

Kind of grain	1974	1975	1976	1977
<i>Million bushels</i>				
Wheat	460	606	651	571
Corn	566	537	695	695
Oats	50	30	26	18
Barley	50	40	45	55
Sorghum	146	98	121	130
Soybeans	304	268	382	354
Rye	5	3	2	2
Flaxseed	5	5	6	4
Sunflower seed	<u>n.a.</u>	<u>4</u>	<u>4</u>	<u>15</u>
Total	1,586	1,591	1,932	1,844

¹Includes net data for 14 primary regionals and 4 interregionals with duplicate volume eliminated.

Appendix table 5—Export disposition: Grain movements to port areas, by kind of grain, 18 regional grain cooperatives, fiscal years, 1974, 1975, 1976, and 1977¹

Kind of grain	Fiscal year			
	1974	1975	1976	1977
<i>Million bushels</i>				
Wheat	313.3	443.2	424.1	374.5
Corn	314.8	303.2	387.7	388.9
Sorghum	72.7	53.9	85.0	96.7
Soybeans	123.2	105.7	150.3	163.4
Other grains	<u>36.2</u>	<u>9.5</u>	<u>20.1</u>	<u>19.1</u>
Total	860.2	915.5	1,067.2	1,042.6

¹Duplicate volume between the 18 regionals (14 primary and 4 interregionals) was eliminated.

Appendix table 6—Export disposition: Summary of kinds of grain moved to cooperative and noncooperative port elevators, 18 regional grain cooperatives, fiscal 1977 and percent to noncooperative elevators, fiscal 1977 and 1976

Volume to port elevators by regional grain cooperatives					
Kind of grain	Total	To co-op elevators	To nonco-op elevators	Percent to a nonco-op elevator	
				1977	1976
Million bushels			Percent		
Wheat	374.5	229.9	144.6	38.6	39.4
Corn	388.9	185.4	203.5	52.3	52.1
Sorghum	96.7	75.8	20.9	21.6	33.3
Soybeans	163.4	105.4	58.0	35.5	35.2
Other grains	<u>19.1</u>	<u>18.5</u>	<u>0.6</u>	<u>0</u>	<u>0</u>
Total	1,042.6	615.0	427.6	41.0	42.2

COOPERATIVE PROGRAM

U.S. Department of Agriculture
Economics, Statistics, and Cooperatives Service

The Cooperative Program of ESCS provides research, management, and educational assistance to cooperatives to strengthen the economic position of farmers and other rural residents. It works directly with cooperative leaders and Federal and State agencies to improve organization, leadership, and operation of cooperatives and to give guidance to further development.

The Program (1) helps farmers and other rural residents obtain supplies and services at lower cost and to get better prices for products they sell; (2) advises rural residents on developing existing resources through cooperative action to enhance rural living; (3) helps cooperatives improve services and operating efficiency; (4) informs members, directors, employees, and the public on how cooperatives work and benefit their members and their communities; and (5) encourages international cooperative programs.

The Program publishes research and education materials and issues *Farmer Cooperatives*. All programs and activities are conducted on a nondiscriminatory basis, without regard to race, creed, color, sex, or national origin.